

**County of San Bernardino
Department of Behavioral Health**

**Procedures for Submission of Chart Documentation and
Charge Data Invoices (CDIs)**

Effective Date 4/9/07
Revision Date 4/24/07


Allan Rawland, Director

Purpose To insure that all services provided are documented and CDIs are completed for each service provided at the Department of Behavioral Health (DBH) clinics.

Documentation Procedures The Documentation procedures are as follows:

Documentation and accompanying [Charge Data Invoices \(CDIs\)](#) must be submitted to the designated clerk at each site within three (3) business days from the date of service. ***No Exceptions.**

The 446 code must be completed on every CDI submitted. The number of hours reported for the 446 code should be the same as the staff's paid hours at the respective reporting unit(s). If more than one CDI is submitted in a single day, the sum of the 446 time on all CDIs should equal the number of hours for which the staff is being paid on that day.

CDIs must be submitted for every day for which the staff are being paid. For paid days off (Leave or Holiday), a CDI should be submitted coding the appropriate administrative code and the 446 code for the amount of paid time off.

CDI submission and accuracy will be managed and monitored according to the attach flowchart at the end of this procedure. **See CDI and ID Note Submission Flowchart below.**

Staff Responsibilities The following are staff responsibilities:

Staff	Responsibilities
Clinicians/Case Managers	<ul style="list-style-type: none">• Complete documentation and write the CDI, including 446 time.• Submit original chart notes with each CDI when it is submitted to the designated clerk.

County of San Bernardino

Department of Behavioral Health

Staff	Responsibilities
Clerical Staff (designated at each site)	<ul style="list-style-type: none"> • Enter CDI information and insure that there is a progress note for each service claimed. • Stamp date of receipt on CDI. • Check CDI and ID Notes for compliance. • Maintain a CDI Error Log of late submissions, CDI coding errors, and documentation errors. An Excel based electronic error log will be supplied each location to facilitate tracking. • Notify the Clinic Supervisor (or designee) of each failure to meet standards. • Input error-free or corrected CDIs into SIMON.
Clinic Supervisor or designee	<ul style="list-style-type: none"> • Receive CDIs and ID Notes with errors from clerk. • Initiate corrective action with responsible clinician/case manager to ensure accurate and timely data entry and chart documentation. • Monitor CDI Error Log on a weekly basis to identify trends and/or recurring problems requiring further corrective action. • For repeated failures to comply with requirements, follow the disciplinary steps as outlined in the Personnel Guideline. • Include continued non-compliance with standards and procedures in staff member's next Work Performance Evaluation (WPE). • Report the results of the documentation checks to the Quality Improvement Coordinator via the Monthly Outpatient Reporting Guide.
Quality Management Division (QM)	<ul style="list-style-type: none"> • During the quarterly outpatient documentation trainings, QM will train all clinical staff about the importance of creating, signing, and submitting a chart note for each billed service. • When conducting audits and focused reviews at each DBH clinic, Quality Management reviewers will continue to emphasize the importance of creating, signing, and submitting a chart note for each billed service. • Quality Management staff will meet quarterly with Clinic Supervisors to address this and other associated procedures.
Program Managers	Responsible for monitoring DBH clinics' compliance with this and other associated procedures.
Deputy Directors	Will monitor Program Manager' compliance with this and other associated procedures.

**County of San Bernardino
Department of Behavioral Health**

**CDI and ID Note
Submission Flowchart**

